

How visible is your customer process?

Human Service. Smarter Systems.

Use these five questions to identify where customers are forced to ask for status because ownership, milestones, or expectations are not visible.

CORE FLOW



THE FIVE FLOW CHECK QUESTIONS

PROMPT	YOUR NOTES
1 After a customer makes a request, can they clearly understand what happens next and when they should expect another response?	
2 Can your employees quickly identify who owns an open request, what stage it is in, and what the next action should be?	
3 Which meaningful milestones in your process should trigger a proactive customer update?	
4 What happens when a promised response date or milestone is missed? Does someone become responsible for communicating the delay?	
5 How many customer calls, emails, or messages are simply asking for status that your process could have provided proactively?	

REMEMBER
If customers keep asking “Any update?”, look at why the progress was invisible before they had to ask.

How visible is your customer process?

Human Service. Smarter Systems.

MAP ONE STATUS JOURNEY

Map one real customer request. Trace one request from receipt through completion and decide where proactive status updates should happen.

CUSTOMER REQUEST OR SCENARIO What did the customer need?
ACCOUNTABLE OWNER
CURRENT STAGE
NEXT ACTION
PROMISED RESPONSE DATE
CUSTOMER-VISIBLE MILESTONES Which changes actually matter to the customer?
CURRENT UPDATE METHOD Phone • email • text • portal • none
WHAT HAPPENS IF OVERDUE? Owner • escalation • customer communication
FIRST IMPROVEMENT TO MAKE One change to reduce "Any update?" contacts
FLOW CHECK ACTION Capture Assign Set Update Escalate